

APPLICATION FOR RECORDS DISPOSITION STANDARD

INSTRUCTIONS: Prepare in duplicate and forward to the Records Management Analyst, Management Systems Division

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|--|---|---|--|---------------|-----------------|----------------|-------------|---------------|------------|
| 3. Dept., Division, Subdivision & Administering Office Address Department of Finance and Administration; Division of Contracts and Procurement Peachtree Summit, 401 W. Peachtree St. NE Atlanta, Georgia 30308 | | FOR RECORDS MANAGEMENT DIVISION USE <table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;">Date Received</td> <td style="width: 33%; border: none;">Application No.</td> <td style="width: 33%; border: none;">Date Completed</td> </tr> <tr> <td style="border: none;">JUL 31 1978</td> <td style="border: none; text-align: center; font-size: 1.2em;">78-152</td> <td style="border: none;">AUG 8 1978</td> </tr> </table> | | Date Received | Application No. | Date Completed | JUL 31 1978 | 78-152 | AUG 8 1978 |
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| 4. Person to Contact Joann L. Bahn | | 5. Working Title Manager of Contract Control | | | | | | | |
| 7. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void | | 6. Telephone Number 586-5269 | | | | | | | |
| 8. Dates of Series Earliest Latest 1972 Present | 9. Records Series Title (followed by title used in office; if different) Vendor Qualification Files | | | | | | | | |
| 10. Division and Office Function What is the function of the Division and the Office in which this record series is created? <p>The Division of Contracts and Procurement is responsible for developing, maintaining, and implementing Authority-wide purchasing procedures, consultant selection procedures, centralized contracting procedures, and all competitive bidding on contracts under MARTA Act.</p> <p>Specifically, the Division is responsible for the purchase of bus parts, materials and services for transit operations; purchase of office supplies, furniture, equipment, miscellaneous services and concessions; administrative management and documentation for all consultant, construction and demolition contracts and federally-funded procurements; maintenance of all official contract files, bidder's lists, vendor file directories, contract lists, and related special reports. The Division is responsible for the retention and maintenance of all contracts and related contract documents so that they are available for audit and periodic review.</p> | | | | | | | | | |
| 11. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: Securing financial and reference data on MARTA vendors. Included are: Statement of Qualifications and Business References, Dun & Bradstreet report, product data, and related correspondence. File is arranged: Alphabetically by vendor name. | | | | | | | | | |
| 12. Monthly Reference Rate How often are records referred to which are: One to six months old <u>1 - 2</u> ; Seven to twelve months old <u>0 - 1</u> ; Thirteen to twenty-four months old <u>0</u> ; twenty-five months and older <u>0</u> ? | | | | | | | | | |
| 13. Annual Rate of Accumulation of Records Letter-size drawers _____ ; Legal-size drawers _____ ; Shelves <u>1</u> ; Other (specify) _____ | | | | | | | | | |

| YES | NO | 14. Questionnaire (Place an "X" in the proper column) |
|-----|----|--|
| X | | a. Is this the official copy of the series? If not, where is it? |
| | X | b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation. |
| | X | c. Is this a vital record? |
| | X | d. Does this series have historical or long term research value? |
| | X | e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately? |
| | X | f. Is the information contained in this series ever published? If yes, attach copy. |
| | X | g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy. |
| | X | h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? |
| | X | i. Is this series (or a major portion of it) regularly microfilmed? |
| | X | j. Does the record series result in a computer printout? |

15. Retention Requirements

The following requires the series to be kept:

| | | | |
|--------------------------|--------------|-----------------------------------|-----------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | <u>5</u> years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

16. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☐ Fiscal Year; ☒ Other see below then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☒ Transfer to local holding area; hold _____ year(s); then
- ☒ Transfer to ^{MARTA} State Records Center; hold 4 year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

Hold in the current files area one year past last activity.

Then: transfer to Authority Records Center. Hold for four years.
Then Destroy.

These instructions apply to all prior and future accumulations of the series

(Indicate briefly rationale for recommendations above/or write additional remarks):

17. APPROVALS

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|--|---|
| Approved Department Records Management Officer <i>James L. Baker</i> Date <u>6-28-78</u> | Approved Legal Counsel <i>Wayne Crowder</i> Date <u>7/24/78</u> |
| Approved Division Head/Designee <i>[Signature]</i> Date <u>4/25/78</u> | Approved Division of Audit <i>[Signature]</i> Date <u>7/24/78</u> |
| Approved Department Head/Designee <i>[Signature]</i> Date <u>7/20/78</u> | Approved Department of Archives and History <i>[Signature]</i> Date <u>8-4-78</u> |
| Approved Records Management Analyst <i>Carolyn L. Haik</i> Date <u>2/14/78</u> | Approved MARTA Management Advisory Committee <i>[Signature]</i> Date _____ |